



## SAMPLE LANGUAGE FOR A CHARITABLE BEQUEST TO ETF

### **A** TO CREATE AN UNRESTRICTED FUND

I bequeath to ETF (“Foundation”) the sum of \$\_\_\_ (or the property described herein or a certain percentage of the remainder of my estate) for the purpose of establishing an unrestricted fund, which shall be named \_\_\_ Fund. The Fund shall be administered by ETF in perpetuity for charitable purposes of benefit to the area served by the Foundation.

### **B** TO CREATE A FIELD-OF-INTEREST FUND

I bequeath to ETF (“Foundation”) the sum of \$\_\_\_ (or the property described herein or a certain percentage of the remainder of my estate) for the purpose of establishing a field-of-interest fund. Such Fund shall be administered by the Foundation in perpetuity for the purpose of \_\_\_\_\_ and shall be named \_\_\_\_\_ Fund.

### **C** TO CREATE A DONOR ADVISED FUND

I bequeath to ETF (“Foundation”) the sum of \$\_\_\_ (or the property described herein or a certain percentage of the remainder of my estate) for the purpose of establishing a donor advised fund. Such Fund shall be administered by ETF in perpetuity for charitable purposes. The Advisors to this Fund shall be \_\_\_\_\_ and the name of the Fund shall be \_\_\_\_\_. This Fund shall be administered for charitable purposes in accordance with the policies governing donor advised funds observed by ETF.

### **D** TO CREATE A DESIGNATED FUND

I bequeath to ETF (“Foundation”) the sum of \$\_\_\_ (or the property described herein

or a certain percentage of the remainder of my estate) for the purpose of establishing a designated fund. Such Fund shall be administered by the Foundation in perpetuity for the benefit of \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_ (“Charitable Organizations”). In the event of the dissolution of any of these Charitable Organizations, the Foundation shall thereafter use assets of the Fund to benefit the remaining named Organizations or in the event of the dissolution of all the Charitable Organizations the Foundation shall continue to hold the Fund and distribute the income therefrom to such organizations as in the opinion of ETF’s board of directors most nearly meet the purposes and objectives of the Charitable Organizations.

### **E** TO CREATE A SCHOLARSHIP FUND

I bequeath to ETF (“Foundation”) the sum of \$\_\_\_ (or the property described herein or a certain percentage of the remainder of my estate) for the purpose of establishing a scholarship fund. Such fund shall be administered by the Foundation in perpetuity for \_\_\_\_\_ and shall be named \_\_\_\_\_ Scholarship Fund.

#### FOR A BENEFICIARY DESIGNATION OR PAY-ON-DEATH DESIGNATION:

East Tennessee Foundation  
\*Attn: Full Name of Fund  
520 W. Summit Hill Drive, Suite 1101  
Knoxville, TN 37902  
865-524-1223  
Tax ID (for SSN): 62-0807696

*\*If a particular fund is not named, the proceeds will be designated to ETF’s Unrestricted Opportunity Fund.*